

New Client Onboarding

A step-by-step guide for Highball Special



HIGHBALL
— ADVISORS —

Week 1

Sign Advisory Agreement



Week 2

Onboarding Meeting



Week 3

Open TD Ameritrade
Accounts & Transfer



Week 4

Investment Policy
Meeting



Week 5

Investment Policy
Implementation



INVESTMENT MANAGEMENT

Evidence-based investment advice tailored to your retirement, risk, and time horizon.



RAILROAD RETIREMENT

Annual review and valuation analysis of your Railroad Retirement benefits



TAX PLANNING

Multi-year strategic planning to minimize taxes over the course of your life



COMPREHENSIVE FINANCIAL PLAN

Detailed review and analysis of all facets of your financial situation including cash flow and retirement income streams



INSURANCE PLANNING

Maximize your existing insurance policies and explore additional insurance when required



ESTATE PLANNING

Ensure you have the right documents in place and they reflect your wishes and intent for the next generation